

FED/STATE JOINT FORMS DISTRIBUTION

Background

The IRS is planning to expand the Joint Forms Distribution Program. The IRS has had a successful pilot program with 10 states for approximately five years. The Joint Forms Distribution Program is a reciprocal collaboration whereby IRS and participating states fill orders for each other's corresponding tax products. These are reciprocal agreements that result in no money exchange.

When IRS receives a telephone order for Federal forms at one of their Area Distribution Center telephone sites they will offer to send state tax forms if the taxpayer resides in one of the participating states. When a participating state receives an order for state forms they will also offer Federal forms. The state and Federal tax forms are included together in one package and mailed to the customer. This program is separate from the joint form availability at IRS and state walk-in locations.

State tax packages are provided by the states and distributed by the IRS and Federal tax packages are provided by the IRS and distributed by the participating states. The extra costs incurred by a state mailing the Federal tax package is offset by the IRS mailing state tax packages.

Goal

The goal of the Fed/State Joint Forms Distribution Program is to improve customer satisfaction and reduce taxpayer burden.

Benefits For Taxpaying Public

Joint forms distribution will maximize customer satisfaction and reduce taxpayer burden. Taxpayers make only one telephone call to obtain both federal and state forms. This reduces both time and expense while at the same time increasing satisfaction with the tax system. This is particularly beneficial to taxpayers who have filing obligations in more than one state. Joint distribution eliminates duplication of effort since there is only one system with which taxpayers must deal.

Benefits To The States And IRS

Participation in the Fed/State Joint Forms Distribution Program will enhance customer service provided by the participating states and IRS. Customers will deal with only one tax system to obtain forms. Providing taxpayers with access to Federal and state tax forms at one central location contributes to the Service's compliance and taxpayer satisfaction objectives.

Overview Of Program

STATES CURRENTLY PARTICIPATING

At the present time, 10 states participate in the Fed/State Joint Forms Distribution Program. They are: Arizona, Arkansas, California, Kansas, Minnesota, Missouri, North Dakota, Oklahoma, Oregon, and Virginia.

PRODUCTS

The IRS products to be distributed by participating states are limited to three different tax packages, which are: Package 1040-3; 1040-A, and 1040-EZ. The state products distributed are the state's corresponding tax packages and possibly non-resident and part-year forms.

Items contained in the IRS tax packages are:

Package 1040-3 - Form 1040, Schedule A&B, Schedule D, Schedule E, Form 1040-V, Form 2441, and the instructions

Package 1040-A - Form 1040-A, Schedules 1 and EIC, and instructions

Package 1040-EZ - Form 1040 EZ and instructions

The state materials to be distributed will be provided by the states to the IRS and the IRS will provide the IRS tax packages to the states. The material is provided at no cost.

ORDERING AND ORDER FULFILLMENT

The IRS will offer state tax material via the telephone order entry system located at the Forms Distribution Centers. When an order for Federal forms is placed at one of the Centers and the assister identifies that the caller lives in a state for which there is a participating agreement, the assister will offer state tax forms. Likewise, when a taxpayer calls a participating state to request state tax forms, the assister will offer the Federal tax package. During the filing season, the Centers provide live telephone assistance for at least 16 hours a day, 7 days a week.

Both the Federal and State tax forms will be mailed in the same package thus minimizing additional mailing and handling costs.

STORAGE OF STATE TAX PRODUCTS

There are three IRS Forms Distribution Centers that are located in Rancho Cordova, CA; Bloomington, IL; and Richmond, VA. The program for the participating states will be coordinated out of the

Distribution Center designated for that particular geographical area (see map). The state forms for a particular state will be maintained in only one distribution center.

The IRS will assign a catalog number to each state product for IRS internal use. This product will uniquely identify the item for the IRS inventory control system.

FILLING OF ORDERS

Orders for state forms will be filled at the Distribution Center that maintains the stock for that state's material. Because of IRS routing of telephone calls, orders may be taken at a Center other than the one that stocks the material for a particular state. Regardless of which Center takes the order, it will be shipped from the Center in the geographic location of the customer. Most orders are filled by the Center within 48 hours.

PROGRAM PERIOD

The IRS will begin taking forms orders for state products on January 1 of each year. The ending date for taking forms orders will coincide with the filing deadline for the state with the latest date.

The IRS will provide products to the states no later than December 1 of each year. In order to avoid backorders, state products will need to be received by the Distribution Center no later than January 1 of each year.

REPORTS FOR PRODUCT USAGE – ORDERS TAKEN

The IRS will provide usage data to the states for their use in projecting future needs. The IRS will also need to have usage data from the states for IRS packages distributed. The reporting method will be determined between each state and the servicing Distribution Center.

COMMUNICATION

The Fed/State Coordinators will be the central points of communication for states interested in participating in the program and for additional information.

CONTACTS FOR IRS

A Fed/State Coordinator is established at each Distribution Center. They can be contacted for additional information. They are:

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